**SFA Modernization Partner Program**
**Monthly Management Services Summary**
**For the Month of October 2001**


November 10, 2001


38.3.2e- PROGRAM MANAGEMENT SERVICES SUMMARY

_____

**TABLE OF CONTENTS**

---

## I. INTRODUCTION

This report covers the month of October 2001 and includes the following:

- Information on overall project completions/ implementations for this reporting period.
- Major milestones achieved during the month.
- Program level risks and issues.
- Monthly scorecards.
- Significantly late deliverables.

This report format is the result of a collaborative effort between SFA and Modernization Partner executives to improve the information provided to SFA Executives. We will continue to refine these monthly summaries to improve their usefulness and value.  Please provide any suggestions regarding these reports to the SFA Modernization Partner Program Manager (eric.l.stackman@accenture.com or 202-962-0624).

---

## II.    PROJECT COMPLETIONS/ IMPLEMENTATIONS FOR THIS REPORTING PERIOD

This section reports on the completion or implementation of Modernization Partner projects.

**CFO**
- Successfully went live with FMS Release 3.4 on 10/1/01 with interfaces to GAPS, Campus Based, Direct Loan – Origination, and Direct Loan Consolidation.  Additionally, the interface from Direct Loan – Servicing to FMS began on 10/1/01 as well.

**CIO**
- Implemented and validated EAI Architecture for 4 legacy systems (eMPN, P-Note, eCampus Based, and FMS as part of EAI Release 2.
- Completed the Integrated Technical Architecture (ITA) Release 2 project, which provides an enterprise-wide, service-oriented technical architecture to serve as the foundation for all newly developed SFA internet based applications.

**FINANCIAL PARTNERS**
- Completed the Guaranty Agency (GA) Voluntary Flexible Agreement (VFA) project and implemented the VFA extensions, which successfully integrated the VFA process with FMS.  This resulted in an automated, web based process for execution of VFAs between the Department of Education and GAs participating in the VFA program.

**ORGANIZATION TRANSFORMATION**
- Successfully completed the SFA University Front 2 Back training on 10/16/01 with a lessons learned session for presenters and facilitators.

---

## III. VALUE POINTS

This section reports value delivered above and beyond anticipated activities.

**FINANCIAL PARTNERS**
- Formed Modernization Partner/SFA team that will conduct a performance assessment of VFA Data.

**CIO**
- Signed a Non-Disclosure Agreement with CSC that will provide Modernization Partner with greater visibility into the rationale for VDC cost estimates. This closer relationship between Modernization Partner and CSC will benefit SFA by adding increased confidence in the cost estimating of modernization projects and may provide opportunities for additional savings.
- The SFA Modernization Partner is leveraging industry best practices employed by large organizations in the design of the SFA Portal initiative as well as the Single Sign On initiative. Experienced managers from the Modernization Partner have been engaged on the program to help facilitate the knowledge transfer as well the development of the respective business cases.

**PROGRAM MANAGEMENT**
- Continued to support the SFA CIO Technical Handbook IPT.
- Participated in SFA offsite which included topics such as the communication of Modernization activities and the overall integration of Modernization projects.

## IV.    MAJOR PROJECT MILESTONES ACHIEVED

This section presents Modernization Partner's significant accomplishments on a Channel-by-Channel basis.  These milestones may include the completion of a project phase or the acceptance of a major deliverable in line with the project's workplan.

### CFO
- Delivered two training sessions for SFA Accounting Division personnel.  These sessions pertained specifically to Manual Accounts Payable (AP) and General Ledger (GL) procedures, as well as Non-GAPS functionalities for the Pell and Campus Based Programs.

### CIO
- Completed the first phase of the eSign Possibilities initiative which identified 8 additional SFA business processes as potential candidates for electronic signature capabilities.  The team is now working with the SFA project leads to provide assistance in developing the capability.

### FINANCIAL PARTNERS
- Received acceptance of the FARS Retirement detail design deliverables and conducted the Development Phase Kick-Off.
- Completed Voluntary Flexible Agreement (VFA) Guaranty Agency (GA) User Testing.
- Successfully completed the VFA Production Readiness Review.

### ORGANIZATION TRANSFORMATION
- Completed the Action Plan for Training Delivery Tools deliverable, which included a revised business case for the Learning Management System (LMS) and outlined a plan for implementing process changes associated with LMS.
- Received acceptance of the Learning Consultant Definition deliverable, which documented the early planning stages for developing this role within SFA University.
- Delivered the Career Zone Performance Management Review, which includes survey instruments and tracking tools developed to measure employee satisfaction with the Career Zone.
- Completed system integration efforts for the pilot phase of the HR Modernization initiative, which includes newly introduced performance management capabilities to SFA employees.

### PROGRAM MANAGEMENT
- Submitted the Modernization Blueprint – First Draft to SFA for review and comments.
- Developed framework and process for Modernization communications across the entire SFA enterprise.  Effort will be coordinated with integration activities as part of the overall workplan developed at the Tides offsite.
- Drafted next iteration of the Target State Vision.
- Developed draft of the Modernization Map which lays out the connections among the Target State Vision, the Business Architecture Views, the IT Portfolio (Placemat), and the Master Integration Plans.

### SCHOOLS
- Completed the COD Definition Phase Tasks for the Test team, Customer Service team, and the Training, Communication and Outreach team.
- Successfully completed the eCampus Based Post-Production Readiness Review.

---

**STUDENTS**
- Completed the "As-Is" picture of the current SFA Customer Interaction Centers (CICs) as part of the Consistent Answers for Customers – CRM Call Center IPT.
- Completed the development and functional testing activities for FAFSA on the Web 6.0. System test for FAFSA on the Web 6.0 was initiated on 10/2/01 as planned. Additionally, Modernization Partner completed 2 of 5 planned performance tests and the system scaled as planned. Usability testing for FAFSA on the Web 6.0 has also been completed with minor problems which are being corrected.

---

## V.    RISKS AND ISSUES

This section reports the issues and risks that are currently causing or could potentially cause a very significant impact on the Modernization Partner Program's goals.

| Area | Program Management/CIO |
|---|---|
| **Description** | The CIO budget has a shortfall in VDC services.  Current CIO strategy is to leverage Modernization funds to cover the shortfall. |
| **Impact** | The diversion of Modernization funding towards operational expenditures will hinder the ability to meet FY02 Modernization Program goals. |
| **Assistance Requested from SFA** | Assistance from the CIO General Manager is required to resolve the budget impasse. |
| **Proposed Solution/ Mitigation Strategy** | Currently working with the VDC, CFO, and CIO organizations to seek alternatives to solving the budget problem including scope synergies, scope reductions, and additional funding sources. |
| **Progress/ Resolution** | The resolution is in progress and targeted for resolution by 11/15/01. |

_____

## VI.   TASK ORDER STATUS REPORT SUMMARY

This section presents an extract of all "Red" assessed criteria.  The extract is taken from the Bi-Weekly Task Order Status Reports.  (See Appendix VI. for the more information on the Bi-Weekly Task Order Status Reports.)

| Task Order | Assessment Criteria | Assessment | Comments |
|---|---|---|---|
| TO 77 WO  02 - Common Origination & Disbursement | Overall | Red | The overall project status remains Critical (RED) due to delays in defining COD requirements.  These activities are approximately 99% complete.  All RSDs have been through initial review; 14 of 14 have been finalized.  Development is complete for Release 1.0a and underway for Release 1.0b. |